# Volunteer Application Processing

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## Goals

1. Track volunteer applications from the time they are turned in until the time the applicant is placed/not placed by a ministry leader.
2. Ensure ministry leaders are notified of new applications in a timely manner.
3. Allow the appropriate staff to access the status of applications being processed using MinistryPlatform.
4. Automate application/opportunity requirements when an application is created.
5. Inform applicants of application status (application received, delinquent references, meeting with ministry leader).
6. Keep ministry leaders accountable by notifying supervisors of neglected applications.
7. Reduce RMC’s overhead in following up with volunteer application references.
8. Allow the congregation to apply for volunteer opportunities using the Portal.

## New Volunteer Workflow

1. List volunteer opportunities on the **Opportunity Finder** portal page.
2. Applicants respond to opportunities by completing an online application.
   1. One opportunity will be created for every volunteer position.
   2. One group role will be created for every opportunity.
   3. The applicant locates the opportunity on the Opportunity Finder page.
   4. The applicant either completes the entire form or indicates they already have an application on file.
   5. If the applicant completes more than one application, the applicant will indicate his first, second or third choice in the **Message** field on the response form. The applicant needs to only complete one volunteer application.
3. The Ministry Leader (ML) for the opportunity is notified immediately of responses to opportunities in his/her ministry area via Ministry Platform task and/or email.
4. An automated email is sent to the applicant confirming their response submission and outlining the next steps for the applicant to take. This email is configured when an opportunity is created and a **Response Message** is assigned to it. A routine runs every 15 minutes to send out these messages. This automated response was developed as a customization for our church by Kevin McCord. This body of this response message will include the following:
   1. Request references – The applicant will be responsible for soliciting reference requests to RMC.
   2. Create Portal account.
   3. Submit photo for application via Portal or at Information Center.
5. When a new application is created, a trigger will run that creates a list of requirements that must be completed in order for the volunteer application to be processed. Each list of requirements will depend on the opportunity for which the applicant is applying. Here is a list of all requirements:
   1. ML Initial Contact
   2. Applicant photo
   3. Reference check (2)
   4. Background check
   5. Interview
6. The ML 14 days to make the initial contact with the applicant.
7. The applicant is responsible to ensure his photo and references are sent to RMC. RMC will no longer be contacting references.
8. The Volunteer Coordinator will verify if the applicant has submitted his photo and has supplied references. The VC will also conduct applicant background checks.
9. The applicant has 45 days to complete the application process from the time the application is submitted. If the application exceeds 45 days and the applicant has not completed his application, the application should be closed. When the application is closed, the applicant will receive an email indicating its status and a reminder to complete the requirements. The application can be reopened at the applicant’s request.

## Changes to Page/Section Structure

A few pages need to be added and/or changed in order to process applications. MP’s feature-set to deal with Opportunities and Responses is used to process responses to volunteer opportunities. Out of the box, MP uses “Opportunities” as a way for a Portal user to become involved with the fellowship (e.g. volunteer). These opportunities either stand alone or they are tied to an event. If the opportunity is tied to an event, then the opportunity will be visible when the user views the event OR on the opportunity finder. If the opportunity is not tied to an event, then it will only show up in the Opportunity Finder. To clarify these opportunities, a new field will be added to the **Opportunities** table (i.e., “Opportunity Type”). These opportunity types are **Volunteer** or **Event**.

By default, the page **Participation -> Responses** page is used to display ALL responses, and the **Participation -> Response Follow-Ups** page displays ALL follow ups to ALL responses (i.e. both **Event** and **Volunteer** opportunity types). However, the volunteer application process deals only with responses to **Volunteer** opportunity types. So, a new page titled **Volunteer Applications** will be added to show only responses to such opportunities, and the **Volunteer Requirements** page will deal with all follow-ups for volunteer applications. The **Reponses** page and **Response Follow-Ups** page will focus on responses to **Event** opportunity types.

A new section titled **Volunteering** will be added with the following pages:

|  |  |
| --- | --- |
| **Page Name** | **Description** |
| Volunteer Applications | Records of all responses to a volunteer opportunity. |
| Volunteer References | The personal references for a volunteer application. |
| Volunteer Requirements | The follow ups done by RMC staff/ministry leaders to process an application. |
| VA Requirement Statuses | The status names that indicate the process stage of a requirement for a ministry. |
| VA Requirement Types | The types of requirements to be completed for any application (background check, reference check, interview, etc.). |

A new page titled **Opportunity Types** will be added to the **Lookup Values** section.

Move the **Background Checks** page to the **Volunteer** section.

## Implementation

1. Create groups for each volunteer opportunity. This allows for the person responding to the opportunity to be placed in the proper group.
2. Create group roles for each opportunity. These roles will determine if optional requirements are needed (background check, references, interview).
3. Create lookup tables (see **Database Schema Changes – New Tables**).
4. Create online forms.
5. When an applicant completes the initial response, the applicant will be asked if he already has a MA on file.
6. Create processes.
   1. Look up the contact for the opportunity (aka Ministry Leader – ML). When a response to an opportunity has been created, notify the ML.
7. The ML will make sure the applicant is placed in the proper group.
   1. The ML will contact the applicant (either a phone call or email). This email can be a template or written individually. The email should be sent from the **Group Participants** page.
8. Some responsibilities will transition from the Volunteer Coordinator (VC) to ML’s.
   1. ML’s will oversee that volunteers complete all the requirements for their ministry. Such requirements may include but are not limited to:
      1. Volunteer Application
      2. References (Applicants are responsible for following up on references. ML’s will only let an applicant know of delinquent references)
      3. Interview
   2. The VC will be responsible for running background checks, making sure the applicant has a user account and photo on file.
9. Applicant Photo
   1. Applicants can upload their own photo after creating a Portal account.
10. New Pages
    1. Will be created to display Volunteer Applications and related information. Any pages NOT created by new tables will be created with filtered pages.
    2. New Filtered Pages
       1. New Page: **Volunteer Applications**. Source Page: **Responses**
       2. New Page: **Volunteer Requirements**. Source Page: **Response Follow-Ups**
    3. New Pages
       1. New Page: **Volunteer References**
          1. This page will have a FK to the **Responses** table. This relationship will attach the reference to the proper application.
          2. A subpage needs to be created so the responses can be seen from the **Volunteer Application** page.
          3. A trigger copies responses from the **RMC Volunteer Application References** custom form to this new page.
    4. New/Edited Sub Pages – Both of the pages below will be created when the filtered page **Volunteer Applications** is created by coping the **Responses** page. Be sure to check the box to copy the subpages when the page is being copied.
       1. New Subpage: **References**
          1. The main page is **Volunteer Applications**
          2. This page WILL NOT be created when copying the main **Responses** page. This page must be added manually.
       2. New Subpage: **Requirements**
          1. The main page is **Volunteer Applications**
          2. This page is created when copying the main page. The subpage needs to be renamed from **Follow Ups** to **Requirements**.
       3. New Subpage: **All Applications**
          1. The main page is **Volunteer Applications**
          2. This page is created when copying the main page. The subpage needs to be renamed from **All Responses** to **All Applications.**
          3. Make sure all column names on this subpage match what those that have been created in the sandbox.
11. Online Forms
    1. Opportunity Response – Initial response made by the applicant to a volunteer opportunity. This response will include the Volunteer Application.
    2. Reference Form
12. Create Triggers
    1. See **Triggers** section.
13. Create Views
    1. See **Views** section.
14. Create Reports
    1. See **Reports** section.

## Database Schema Changes

1. **New Tables**
   1. Name: **RMC\_VA\_Requirement\_Statuses**
      1. Reason Needed: This table relates to the **Response\_Follow\_Ups** table. It keeps track of the status of the follow up item.
      2. Fields
         1. RMC\_VA\_Requirement\_Status\_ID: int, PK, IDENTITY(1,1), NOT NULL
         2. Follow\_Up\_Status: nvarchar(35), NOT NULL
            1. Values: Needed, Completed
         3. Domain\_ID: int, NOT NULL
   2. Name: **RMC\_VA\_Requirement\_Types**
      1. Reason Needed: This table relates to the **Response\_Follow\_Ups** table. It tracks what requirements are needed for a volunteer application.
      2. Fields
         1. RMC\_VA\_Requirement\_Type\_ID: int, PK, IDENTITY(1,1), NOT NULL
         2. Follow\_Up\_Type: nvarchar(35), NOT NULL
            1. Background Check, Reference Check, Interview, Training
         3. Domain\_ID: int, NOT NULL
   3. Name: **RMC\_VA\_References**
      1. FIelds
         1. RMC\_VA\_Reference\_ID: int, PK, IDENTITY(1,1), NOT NULL
         2. Name: nvarchar(75), NOT NULL
         3. Phone: nvarchar(12), NOT NULL
         4. Applicant\_Name: int, NOT NULL, FK to Response\_ID (The **Selected Record Expression** property for the **Volunteer\_Application** page will be the name of the applicant + the opportunity name. This way the name will show itself in this field in MP.)
         5. Ministry\_Name: nvarchar(100) – The name of the ministry the applicant is applying for.
         6. How\_Well\_Know: nvarchar(150), NOT NULL
         7. Relationship: nvarchar(50)
         8. Spiritual\_Maturity: tinyint
         9. Patience: tinyint
         10. Emotional\_Stability: tinyint
         11. Leadership\_Ability: tinyint
         12. Work\_With\_Others: tinyint
         13. Overall\_Attitude: tinyint
         14. Do\_You\_Recommend: tinyint
         15. Ministry\_Potential: nvarchar(25)
         16. Crimes\_Against\_Children: bit
         17. Comments: nvarchar(255)
         18. \_Form\_Response\_ID: int – The Form\_Response\_ID used to create the reference. This can be used to track back to the form response if needed.
   4. X Name: **RMC\_Opportunity\_Types**
      1. Reason needed: There needs to be a way to distinguish between an opportunity related to the volunteer process and all other opportunities. This type will serve to determine if a volunteer process should be triggered. There also needs to be a way to distinguish between types when looking at responses on the Responses page. The VC only needs to process these types.
      2. Fields
         1. RMC\_Opportunity\_Type\_ID, int, PK, identity(1,1)
         2. Opporunity\_Type: nvarchar(50)
2. **Existing Tables - New Fields**
   1. Table: **Group\_Roles**
      1. New Field Name: **Reference\_Check\_Required**: bit
         1. Reason needed. Determines if a personal reference is required for the applicant.
      2. New Field Name: **Interview\_Required**: bit
         1. Reason Needed: Determines if an interview is required for the applicant.
   2. Table: **Response\_Follow\_Ups**
      1. New Field Name: **Status**: int FK to RMC\_VA\_Requirement\_Statuses
      2. New Field Name: **Type**: int FK to RMC\_VA\_Requirement\_Types
   3. Table: **Opportunity**
      1. New Field Name: **Opportunity\_Type**: int, FK to RMC\_Opportunity\_Types.RMC\_OpportunityType\_ID
   4. Table: **Responses** (Volunteer Applications)
      1. New Field Name: **Closure Date**: date
      2. Reason Needed: The difference in time from when the response is created to when it is closed needs to be tracked. This will be used to determine if applications are taking too long to close.
   5. Table: **Form\_Responses**
      1. New Field Name: **\_Form\_Copied**: bit, default value = 0.
      2. Reason needed. This field stores the value to determine if a record has been copied to the **RMC\_VA\_References** table. So if the value is “1” (True), then the record has been copied.

## Triggers

1. Table: **Responses**
   1. Name: **RMC\_Create\_VA\_Requirements**
      1. Reason Needed: Creates the requirements for each volunteer application based on the “Role Title” assigned to the Opportunity to which a person responds to. See the code supplied by Kevin Hoffman.
         1. This trigger will determine if a photo and a background check is needed based on the existence of a photo/bgc associated with the contact. If the response is assigned to the DEFAULT CONTACT, then a photo/bgc requirement will be marked as “Needed”. When the VC assigns the application to the correct contact, she will need to determine the photo/bgc needs of the applicant.
   2. Name: **RMC\_Update\_VA\_Requirements**
      1. Reason Needed: After the VA requirements are created, many responses will be assigned to the DEFAULT CONTACT participant. In doing so, if a photo and/or BGC exists for the person filling out the application, the code will not check for their existence. So when an update occurs an update trigger needs to have code that checks for this. The code should only run under the following conditions: 1. Only when one record is updated. If a mass update is done (i.e, mass assign, then do not run the code. 2. Only when the participant is changed from DEFAULT CONTACT to another participant.

## New Pages

1. **Volunteer Application** (Filtered)
   1. Source Page: **Responses**
   2. Filter: Opportunity Type is **Volunteer** (4)
   3. Creation: Go to **System Setup -> Pages -> Responses** and copy the page. Check all the boxes in the next window to copy reports, tools, sub-pages, etc.
   4. Place the page in a new section titled **Volunteering**.
   5. Give security role access to all pages, sub-pages, reports, tools, etc.
2. **Volunteer Requirements** (Filtered)
   1. Source Page: **Response Follow Ups**
   2. Filter: Opportunity Type is **Volunteer** (4)
   3. Creation: Go to **System Setup -> Pages -> Response Follow-Ups** and copy the page. Check all the boxes in the next window to copy reports, tools, sub-pages, etc.
   4. Place the page in a new section titled **Volunteering**.
   5. Give security role access to all pages, sub-pages, reports, tools, etc.

## Stored Procedures

Note: All stored procedures related to reports are listed in the **Reports** section.

1. Name: **RMC\_Copy\_Form\_Response\_To\_Custom\_Table**
   1. Reason Needed: A stored procedure needs to be created to run regularly to copy data from the “RMC Volunteer Applications – References” custom form to the “RMC\_VA\_References” table.
   2. Important Notes
      1. **THE NAME OF THE CUSTOM FORM MUST BY “RMC Volunteer Applications – References”** or the code will not work properly.
      2. **This code is dependent upon values created from a new form. If the originating form is changed in anyway, then the code needs to be reassessed. For example, if a form question is added or deleted, then the id number for that question needs to be changed in the code.**

## Processes

### RMC VA New Response Notify ML

1. Assign a Task - Ministry leader contacts applicant via email or phone after response.
2. Escalation – Assign a Task – Notify supervisor if contact is not made within the follow up time limit.
3. Assign a Task – Ministry leader assigns **Response Result** of **Placed** or **Not Placed** to response record.
4. Escalation – Assign a Task – Notify supervisor if placement is not made with the placement time limit.
5. The process will assign a value of **Closed = 1** to close the response.

### RMC-VA-Background Check Needed

1. Notify VC of applicant response.
2. Create a timer to VC to complete background check in certain amount of time.

### RMC-VA-Background Check Completed

1. Notify the Ministry Leader that a background check has been completed.

### RMC-VA-Reference Received

1. Notify the Ministry Leader (ML) when a reference has been completed for an application. When the completed references is received, the VC will assign the reference to the volunteer application.

### RMC-VA-Closed-Action Needed

1. Notifies applicant the Ministry Leader (ML) is closing the request because the ML has not received the necessary information from the applicant to complete his application.

### RMC-VA-Closed-No Response

1. Notifies applicant the Ministry Leader (ML) is closing the request because the ML is not receiving any response from the applicant to complete his application.

## Custom Forms

1. Volunteer Application - Need to create a custom form and add it to the opportunity. This form will contain the questions for the volunteer to answer that are currently on our paper application.
2. Volunteer References – Allows references to respond to reference requests.

## Reports

1. Audience/Users: Volunteer Coordinator
   1. Name: **RMC\_VA\_References\_to\_be\_Assigned**
      1. Description: Lists all references that need to be assigned to a volunteer application.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_References\_to\_be\_Assigned**
   2. Name: **RMC\_VA\_Background\_Checks\_Needed**
      1. Description: Lists all the background checks need to complete volunteer applications.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_Background\_Checks\_Needed**.
   3. Name: **RMC\_VA\_Photos\_Needed**
      1. Description: Lists all applicants that do not have a photo on file.
      2. Stored Procedure/dataset: **RMC\_VA\_Photo\_Needed**.
2. Audience/Users: Ministry Leaders
   1. Name: **RMC\_VA\_Open\_Applications**
      1. Description: Lists all open Applications.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_Open\_Applications**
      3. Features
         1. Flag new applications that have no follow ups.
         2. Flags apps that are overdue (have not been closed in 45 days).
         3. Flags apps that have not had an initial ML follow up within 14 days.
            1. When the ML follows up, the ML MUST edit the status value (i.e., **Completed**, **Needed**) AND MUST edit the date and time of the follow up.
         4. Sort applications (responses) with the oldest apps at the top.
         5. Sort follow up activities by placing needed follow ups at the top with the oldest item at the top.
      4. VB Code to make row flag visible (value of “Hidden” property).
         1. =IIf(Fields!Days\_Open.Value > 45, False, IIF(DateDiff("d",Fields!Follow\_Up\_Date.Value,Today()) + 1 > 14 AND Fields!RMC\_Response\_Follow\_Up\_Type\_ID.Value = 5 AND Fields!RMC\_Response\_Follow\_Up\_Status\_ID.Value <> 1, False, IIF(DateDiff("n", Fields!Response\_Date.Value, MAX(Fields!Follow\_Up\_Date.Value))=0, False, True)))
      5. VB Code for the text value
         1. =IIf(Fields!Days\_Open.Value > 45, "Delinquent Application - Please Close or Check with Applicant on Needed Requirements", IIF(DateDiff("d",Fields!Follow\_Up\_Date.Value,Today()) + 1 > 14 AND Fields!RMC\_Response\_Follow\_Up\_Type\_ID.Value = 5 AND Fields!RMC\_Response\_Follow\_Up\_Status\_ID.Value <> 1, "Ministry Leader Has Not Made Initial Contact Within 14 Days", IIF(DateDiff("n", Fields!Response\_Date.Value, MAX(Fields!Follow\_Up\_Date.Value))=0, "New Application - No Actions Taken", "")))
   2. Name: **RMC\_VA\_Open\_Applications\_By\_UGUID**
      1. Description: Lists all open volunteer applications of the currently logged in user. This is the same report as **RMC\_VA\_Open\_Applications**, but it is based on a different dataset.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_Open\_Applications\_By\_GUID**
3. Audience/Users: Supervisors
   1. Name: **RMC\_VA\_Overdue\_Applications**
      1. Description: Lists all delinquent application report. This is the same report as **RMC\_VA\_Open\_Applications**, but it is based on a different stored procedure.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_Overdue\_Applications**
   2. Name: **RMC\_VA\_Days\_To\_Close**
      1. Description: Lists all closed applications and the number of days it took to close the application. The applications are grouped by Ministry Leader.
      2. Features:
         1. Flags overdue apps (longer than 45 days to close).
      3. Stored Procedure/dataset: **RMC\_report\_VA\_Days\_To\_Close**
4. Audience/Users: All
   1. Name: **RMC\_VA\_Volunteer\_Application**
      1. Description: Mimics the current volunteer application so ministry leaders can print a completed application.
      2. Stored Procedure/dataset: **RMC\_report\_VA\_Volunteer\_Application**

## Views

1. Page: Volunteer Requirements
   1. View: My Needed Requirements
2. Page: Volunteer References
   1. View: My References
3. Page: Volunteer Applications
   1. View: My Open Applications
   2. View: My Closed Applications
   3. View: My Overdue Applications

## Staff Roles/Responsibilities

1. Volunteer Coordinator
   1. See the section titled **Processing Application Requirements** for more information on how to follow up on each of the requirements mentioned below.
   2. Assign Default Contacts to the correct participant. If the participant or contact does not exist, create them. Make sure to hit the Submit button so the ministry leader is notified.
      1. When assigning a Default Contact to someone in MP, MP will update the application requirements for that person. HOWEVER, ONCE A PERSON IS ASSIGNED FROM THE DEFAULT CONTACT TO THE ACTUAL CONTACT, DO NOT ASSIGN THAT PERSON BACK TO THE DEFAULT CONTACT AND THEN TO ANOTHER CONTACT. In doing so, MP will assign duplicate requirements to that contact.
      2. After updating a contact from Default to the actual contact, be sure to refresh the subpage.
   3. Process Background Checks (BGC)
      1. Once a BGC has been completed, the SSN will have its value masked to ‘XXX-XX-1234’. It will mask SSN’s 15 days after the BGC has run.
      2. VC needs to make sure the **Background Check Returned** date is entered after receiving the results from a BGC. This is the field a routine will key on to know if to mask the SSN.
      3. Any BGC scans need to be attached to THIS RECORD, not the contact record.
   4. Process References
      1. Check the **Volunteer References** page regularly and note the **Volunteer Application** field. A volunteer application will be identified using this field. The field follows the format [Applicant Last\_Name, First\_Name, Volunteer\_Opportunity] (e.g., Smith, Bill – Worship Team). When this field has a value of “\*\*\*Default, Contact-\*\*\*DEFAULT OPPORTUNITY, the record needs to be associated with the correct volunteer application. Use the drop down to select the correct application record.
   5. Determine if applicant already has a volunteer application on file.
      1. Create a view to show applicants that already have volunteer application on file
   6. Process photos
      1. Run the **RMC Photos Needed** report to see which applicants need photos.
      2. Attach photos taken at the Info Center to applicant contact records. Photos may come in via the Portal. Once photo has been attached to the applicants contact record and marked as the default, this requirement is fulfilled.
   7. Closing Applications – See the section **Closing Applications** later in this document.
   8. Reopening Applications – See the section titled **Reopening Applications** later in this document.
2. Ministry Leader
   1. You must contact the applicant within 14 days of receiving an application in MinistryPlatform. The purpose of this is to introduce yourself, see if the applicant has any ministry related questions, and follow through on completing your requirements. You will be notified immediately (if the applicant has an MP contact record that matches) or when the VC assigns the correct participant to the volunteer app.
      1. If you choose to contact the applicant by email, it is HIGHLY recommended that each ML create his own message template for responses to applicants. For those receiving many applications, it may save you an enormous amount of time.
   2. ML’s are responsible for taking ownership of an application. This means if a requirement has not been completed, the ML should take the initiative to ensure the requirement is completed. In other words, the VC will not ensure the applicant is completing his requirements. This is the responsibility of the ML.
   3. You can interview the applicant as soon as the application comes in. You do not need to wait on references or background checks prior to the interview.
   4. The applicant has 45 days to complete the application process from the time the application is submitted. After 45 days, the ML should close the application.
3. Supervisor
   1. The staff member overseeing each ML’s volunteer application process responsibilities is considered the ML’s supervisor. The supervisor is responsible for ensuring:
      1. The initial ML contact is made (within 14 days).
      2. The application is closed within 45 days.
      3. The periodic review of the number of days ML’s are taking to close applications.
4. Processing Application Requirements
   1. Description: Each application has a set of requirements. The requirements include a photo, two references, a background check and an interview. All positions require a photo. Most positions require two references and a background check. Some require an interview.
   2. Procedure: When processing requirements, you must change the follow up date to the current date/time, set the appropriate action type, status and include a note. Once each requirement has the status of **Complete**, then the application is ready to be closed.
      1. How to follow up on a requirement:
         1. **Follow Up Date** – You MUST set this to the current date and/or date/time. Many reports key off the follow up date field to determine the status of an application.
         2. **Type** – This is the type of requirement. Since requirements don’t change, this value should rarely (if ever) change.
         3. **Action** – This is the action taken (or that needs to be taken) on the requirement. Unmet requirements are created with the action **\*\*\*Follow-Up Needed**. When an action is taken on a requirement, update this field.
         4. **Status** – When a requirement has been fulfilled, change the status to **Completed-Approved**. Many reports key off this field to determine the status of an application. Use the status **Completed-Not Approved** for applicants that have completed the requirement, but failed the requirement standard. For example, a failed background check, an unacceptable photo, a failed reference, etc.
         5. **Notes** – Unmet requirements begin with **\*\*TO DO\*\***. Be sure to overwrite this note and provide an update on what was done when following up on the requirement.
5. Closing Applications
   1. Description: All applications should be closed within 45 days regardless of completed requirements. The purpose of closing the application within 45 days is to keep the application process moving forward for interested applicants and closing applications for those no longer interested in serving. When an application is closed due to incomplete requirements, the applicant will be notified by email. The email reminds the applicant of his application requirement responsibilities (photo, references, etc.) This procedure explains how to close an application.
   2. Procedure: When all of an application’s requirements has the status of **Complete**, then the application is ready to be closed. When closing an application, change the **Response Result** to the appropriate value and mark the application is **Closed** if necessary. The application can be re-opened once new action is taken to meet delinquent requirements.
      1. How to close an application.
      2. Update the **Response Result** field (listed below are the response results and their meanings):
         1. **Placed** – Use when a person has been accepted to serve as a volunteer. This person was placed in the group to which this opportunity is linked with the role defined by this opportunity.
         2. **Not Placed** – Use when a person has not been accepted to server as a volunteer.
         3. **Not Placed-Applicant Action Needed** – The applicant has fulfilled some requirements, but not all of them within 45 days. An email is automatically sent to the notify applicant.
         4. **Not Placed-No Response** – The applicant has not fulfilled any requirements and has not responded to any request for more information. An email is automatically sent to the notify applicant.
         5. **Processing** – The application is currently being processed.
         6. **Processing-Reopened** – The application was closed and the applicant requested the application be reopened for processing. The applicant plans to make sure all the requirements are met.
      3. Change the **Closed** value to **True**.
      4. **Closure Date:** It is very important to include a closure date on the application. A report runs to summarize application activity based on this date.
      5. Ignore the **Event** and **Notification Sent** fields.
6. Reopening Applications
   1. Description: An application is only reopened at the request of an applicant because the applicant is taking steps to complete unfulfilled requirements to complete the application. The application should be closed again with so many days.

## Scheduled Data Maintenance

The stored procedures below need to run regularly to maintain the volunteer application data.

1. **RMC\_Copy\_Reference\_Responses\_To\_Custom\_Table**
   1. Description: Copies reference responses to the correct table so the reference will be associated with the volunteer application.
   2. Schedule: Should throughout the day.
2. **RMC\_Update\_SSN\_to\_SSN\_Mask**
   1. Description: When a volunteer application is completed, the applicant’s SSN is stored in the database. This is not data we should keep after running a background check. The SSN should be changed to only store the last four digits in the format XXX-XX-1234. Every day a routine should run that makes these changes. Changes will be made to applicant SSN’s where a background check has been completed. A BGC will be considered complete if the “Background Check Returned” date is not null.

**Action Items**

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| --- | --- | --- |
| Action Item | Completed | Notes |
| Different response emails based on app requirements types (bgc, refs, etc). |  |  |
| Mask SSN’s | X | Can only be masked on reports, but not in MP. |
| What to do with SSNs if a background check is never completed for an applicant? |  |  |
| Who will be the person that closes an application if the applicant is not following through on meeting requirements? The ML or the VC? I think the ML is the person that needs to be held accountable for overdue apps. The ML can work with the VC to make get questions answered, but the ML should take the initiative to track the application. |  |  |

**Testing**

Need to submit a response using a valid email address. Some processes will require this email address in order for the processes to notify the applicant of issues (no response and closing VA).

|  |  |  |
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| **Testing of RMC\_Update\_VA\_Requirements Trigger** | | |
| **Scenario** | **Contact/Participant Record** | **Result** |
| Insert record with the DEFAULT CONTACT as the participant. Then change the participant to someone with a photo and cleared BGC. | Brad Leppla (Testing2)  Matt Patterson (MP) | Success  Success |
| Insert record with the DEFAULT CONTACT as the participant. Then change the participant to someone with no photo or BGC. | Brandi Patterson (Testing2)  Molly Patterson (MP) | Success  Success |
| Insert record with the DEFAULT CONTACT as the participant. Then change the participant to someone with a photo and no BGC. | Jon Crystal (Testing2)  Brandi Patterson (MP) | Success  Success |
| Insert record with the DEFAULT CONTACT as the participant. Then change the participant to someone with a photo and a Null “All Clear” value. | Cindy Hand (Testing2)  Diggs - Sanchez, Premia (MP) | Success |
| Insert record with the DEFAULT CONTACT as the participant. Then change the participant to someone with a photo and a “Not Clear” BGC. | Ryan Patterson (Testing2)  Chris Webb (MP) | Success  Success |
| Insert record with the DEFAULT CONTACT as the participant on an opportunity with a role that does not require a BGC. Then change the participant to someone with a photo and cleared BGC. | Matt Patterson (MP) | Success |